



TECHNICAL BULLETIN No. 010

TITLE **Evaluation of Proposals/Offers**
REVISION **Number 1**

I. Authority

A. Applicable Statute

- A.R.S. § 41-2533. Competitive Sealed Bidding
- A.R.S. § 41-2534. Competitive Sealed Proposals
- A.R.S. § 41-2535. Procurements not exceeding a prescribed amount; small businesses; simplified construction procurement program

B. Applicable Administrative Code

- A.A.C. R2-7-B301 Solicitation
- A.A.C. R2-7-B312 Bid Evaluation
- A.A.C. R2-7-B316 Multi-Step Sealed Bidding
- A.R.S. § 41-2553 Definitions (Article 3 Part G. Procurement of Information And Telecommunications Systems)
- A.R.S. § 41-2554 Definitions (Article 3 Part G. Procurement of Earth Moving, Material Handling, Road Maintenance and Construction Equipment)
- A.A.C. R2-7-E301 Emergency Procurements
- A.A.C. R2-7-C316 Evaluation of Offers
- A.A.C. R2-7-D302 Request for Quotation

II. Revision Note

This Technical Bulletin revises and supersedes Policy Number 011 Proposal Evaluation Committees effective October 18, 2006.

III. Definitions

Where set forth in normal font, the following definitions are directly from the Arizona Procurement Code. Expanded or additional definitions are in *italics* from sources noted.

- A. **Invitation for Bids (IFB)** means all documents, whether attached or incorporated by reference, which are used for soliciting bids in accordance with the procedures prescribed in A.R.S. § 41-2533.
- B. **Offer/Proposal** means a response to a solicitation.



- C. **Procurement Officer** is any person duly authorized and acting within authorized limits, to enter into and administer contracts and make written determinations with respect to contracts.
- D. **Request for Proposals** means all documents, whether attached or incorporated by reference, which are used for soliciting proposals in accordance with procedures prescribed in A.R.S. § 41-2534.
- E. **Request for Quotation** means an informal solicitation, where quotes are obtained from vendors, without formal advertising or receipt of sealed bids. It may be used for procurements estimated below \$5,000.00 but shall be used for procurements less than that specified in A.R.S. § 41-2535.

IV. **Statement of Policy**

It is the policy of the state of Arizona that:

- A. Documentation is required in the procurement file for all solicitations utilizing evaluation criteria. At a minimum such documentation shall include:
 - 1. A narrative description adequate to explain or defend the evaluation process.
 - 2. Basis for award, signed by the Procurement Officer.
- B. If the procurement requires evaluation, the Procurement Officer shall either:
 - 1. Select and appoint an evaluation committee, or
 - 2. Conduct the evaluation personally
- C. The Procurement Officer may utilize evaluation committees to evaluate offers received in response to Requests for Proposals (RFP), Invitations for Bids (IFB), or to Requests for Quotes (RFQ).
- D. The Procurement Officer who appoints an evaluation committee shall:
 - 1. Develop a written evaluation plan and/or instrument, which includes any sub criteria or evaluation factors for the committee to consider in its scoring and ranking
 - 2. Orient the evaluation team on the use of the evaluation instrument, confidentiality, conflict of interest, and the evaluation process
- E. The Procurement Officer may:
 - 1. Accept or reject the findings of the evaluation committee
 - 2. Return the findings to the committee for additional information
 - 3. Replace the evaluation committee.
- F. The Procurement Officer shall limit the evaluation of IFBs to the assessment of objectively measurable factors outlined in the solicitation to determine the lowest cost to the state.



Effective

This Technical Bulletin is hereby effective this 6th day of May 2008, unless otherwise revised or repealed.

Statute, Administrative Rule, and Executive Orders shall prevail in the event of a discrepancy between this policy and applicable Statute, Administrative Rule, or Executive Orders.

Signature

A handwritten signature in blue ink, reading "Jean A. Clark", is positioned above a horizontal line.

Jean A. Clark, CPPO, C.P.M., CPPB, CPM
State Procurement Administrator